

## FOR IMMEDIATE RELEASE

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## E\*TRADE STUDY REVEALS WHAT INVESTORS WANT FROM MOBILE INVESTING



*More than half of all investors want the comprehensive capabilities of a desktop in their hands*

**NEW YORK, June 22, 2016** — E\*TRADE Financial Corporation (NASDAQ:ETFC) today announced results from the most recent wave of *StreetWise*, E\*TRADE's quarterly tracking study of experienced investors. Results indicate that mobile preferences among investors continue to evolve:

- More than half of investors surveyed want their investing app to have capabilities and functionality that rival their desktop.
- Nearly two out of three investors surveyed believe mobile is critical to monitor their investments.
- More than three out of five investors surveyed are interested in checking the markets on wearables, up from less than two out of five in Q3'15.
- More than one in seven investors surveyed are using an investing app to perform activities typically reserved for the desktop, such as watching educational videos, researching investments, placing orders, and moving money in and out of their accounts.

“Mobile is increasingly sophisticated in its functionality and, in fact, for some investors, it is rendering desktops unnecessary,” said Kunal Vaed, SVP of Digital Channels at E\*TRADE Financial. “Today’s investors seek a comprehensive toolkit for onboarding, idea generation, research, execution, and monitoring on mobile devices — all with the effortless interactions and engaging design of apps. Striking the right balance between simplicity and complexity is critical for our industry to truly meet investors’ needs.”

Mr. Vaed shared additional insight on mobile trading and investing trends:

- **Trading through mobile is trending upwards.** Recent data suggest that more investors use smartphones to trade than ever before. In fact, among E\*TRADE customers, total trades and options trades on smartphones are up 24 percent and 41 percent from 2015.
- **Mobile is the new desktop.** Mobile, once primarily a tool for active traders, has shifted to a mainstream investor platform, delivering a robust suite of investing and trading features once only available on desktop. In response, financial services firms should ensure their digital experiences can seamlessly scale to mobile platforms through responsive design, much like E\*TRADE’s [Adaptive Portfolio](#).
- **One app, many journeys.** Brokers need to design mobile apps to accommodate most user journeys across active traders, mainstream investors, and stock plan participants. Mobile apps offer unique ways to tailor a user’s experience. For instance, E\*TRADE’s iPhone app users can customize their menu, home page, and portfolio information.

Visit E\*TRADE’s [Newsroom](#) for the full Q2’16 StreetWise study results.

E\*TRADE helps investors balance today’s needs with tomorrow’s goals, through pioneering digital tools coupled with guidance online and from financial consultants. To learn more about E\*TRADE’s trading and investing platforms and tools, visit [etrade.com](#).

For useful insight from E\*TRADE and third-party investment professionals, follow the Company on Twitter, [@ETRADE](#).

### About the Survey

This wave of the survey was conducted from April 1 to April 8 of 2016 among an online U.S. sample of 907 self-directed active investors who manage at least \$10,000 in an online brokerage account. The survey has a margin of error of  $\pm 3.25$  percent at the 95 percent confidence level. It was fielded and administered by ResearchNow. The panel is broken into thirds of active (trade more than once a week), swing (trade less than once a week but more than once a month), and passive (trade less than once a month). The panel is 65 percent male and 35 percent female with an even distribution across online brokerages, geographic regions, and age bands.

### Referenced Data

To what extent do you agree or disagree with the following statement? It is important to me that my brokerage's mobile app has robust capabilities that rival my brokerage's website experience.				
		Age		
	TOTAL	25-34	35-54	55+

Agree (Top 2 Box)	56%	71%	63%	42%
Disagree (Bottom 2 Box)	44%	29%	37%	58%

<b>The ability to monitor my investments and execute trading decisions on the go is critical to me.</b>				
		<b>Age</b>		
	<b>Total</b>	<b>25-34</b>	<b>35-54</b>	<b>55+</b>
Agree (Top 2 Box)	65%	79%	69%	54%
Disagree (Bottom 2 Box)	35%	21%	31%	46%

<b>Using a scale from 1 to 5, where 5 means 'very frequently' and 1 means 'never', please rate how often you use your smartphone to...(Top Two Box)</b>				
		<b>Age</b>		
	<b>TOTAL</b>	<b>25-34</b>	<b>35-54</b>	<b>55+</b>
Monitor the market	34%	47%	36%	25%
Get stock quotes	31%	43%	35%	21%
Monitor your portfolio	27%	39%	28%	21%
Read news about companies or industries or the market	25%	37%	30%	14%
Check your watch list	25%	35%	29%	15%
Check on orders	22%	36%	25%	10%
Search/screen for stocks, bonds, mutual fund or ETFs	19%	32%	23%	8%
Research stocks, bonds, mutual funds or ETFs	19%	33%	24%	7%
Place orders	18%	34%	20%	7%
Move money in or out of your brokerage account	16%	29%	21%	5%
Watch educational videos on investing	16%	29%	19%	5%

<b>Which of the following would you be most likely to use a wearable device (like the Apple or Android Watch) to do, when it comes to investing and trading? (Top Two Box) (Q216)</b>				
		<b>Age</b>		
	<b>Total</b>	<b>25-34</b>	<b>35-54</b>	<b>55+</b>
Check the markets	61%	61%	60%	68%
Check your portfolio	56%	55%	60%	46%
Check your watchlist	37%	37%	39%	31%
Receive notifications about stock movement	28%	29%	25%	33%
Receive notifications about account activity	14%	15%	13%	17%
Place trades	4%	4%	3%	5%

<b>Which of the following would you be most likely to use a wearable device (like the Apple or Android Watch) to do, when it comes to investing and trading? (Top Two Box) (Q315)</b>				
		<b>Age</b>		
	<b>Total</b>	<b>25-34</b>	<b>35-54</b>	<b>55+</b>
Check the markets	38%	37%	39%	40%

Check your portfolio	36%	32%	40%	31%
Check your watchlist	11%	11%	10%	12%
Receive notifications about stock movement	8%	10%	4%	9%
Receive notifications about account activity	6%	7%	4%	9%
Place trades	2%	2%	3%	-

<b>E*TRADE Mobile and Option Mobile Trades 2015 vs. 2016 (January - April)</b>		
	<b>Total</b>	<b>% Change</b>
2015 Mobile Trades	1,646,973	24%
2016 Mobile Trades	2,045,307	
2015 Option Mobile Trades	261,635	41%
2016 Option Mobile Trades	368,674	

### **About E\*TRADE Financial**

E\*TRADE Financial and its subsidiaries provide financial services including online brokerage and banking products and services to retail customers. Securities products and services are offered by E\*TRADE Securities LLC (Member FINRA/SIPC). Bank products and services are offered by E\*TRADE Bank, a Federal savings bank, Member FDIC, or its subsidiaries and affiliates. More information is available at [www.etrade.com](http://www.etrade.com). ETFC-G

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